

Statewide
and Regional
Tourism Facts
and Figures

California Fast Facts 2005



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Hollywood Walk of Fame, Hollywood



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Direct all inquiries and correspondence to:

California Tourism

980 9th Street, Suite 480
Sacramento, CA 95814-2749
Tel: (916) 444-4429
Fax: (916) 444-0410
E-mail: info@cttc1.com
Web site: www.visitcalifornia.com

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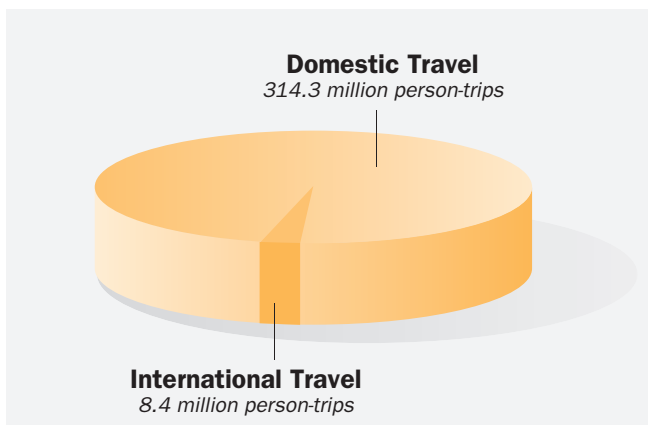
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Executive Summary

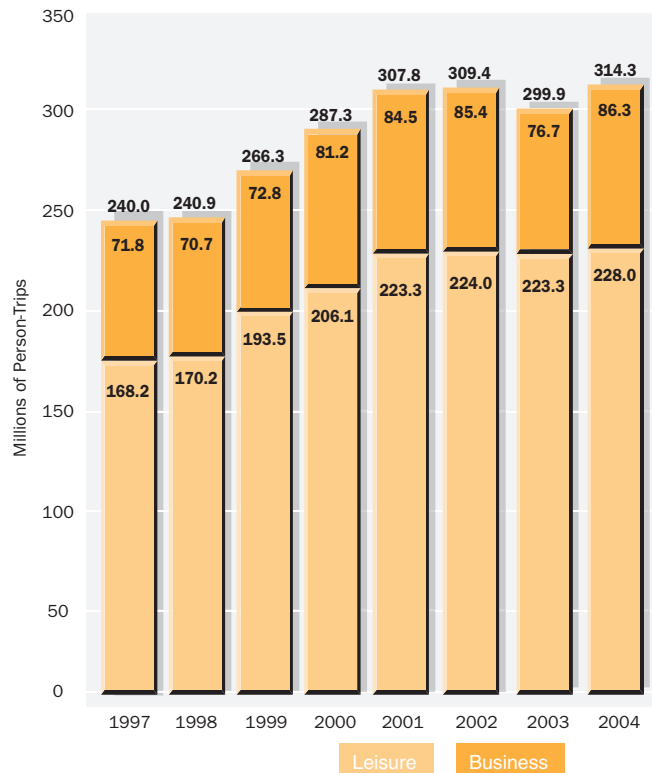
- Total direct travel spending in California was \$82.5 billion in 2004, a 7.4 percent increase over the preceding year. This was the second straight year of positive growth and the greatest increase since 2000. Spending by international visitors comprises more than 15 percent of all travel spending in the state.
- California was the destination of 314 million domestic travelers and approximately 8.4 million international travelers, leisure and business, in 2004, the most recent year available.
- Californians themselves are the mainstay of the state's travel and tourism industry, comprising 85 percent of domestic travel, or 265.7 million person-trips. Out-of-state visitors account for 48.6 million person-trips. California's top domestic markets in 2004 were Nevada (contributing approximately 7.9 million person-trips), Arizona (6.6 million), Texas (4.7 million), Oregon (2.8 million), New York (2.5 million) and Washington (1.9 million).
- California hosted 4.2 million overseas visitors in 2004. The top five overseas visitor market countries in 2004 were the United Kingdom (693,000 visitors), Japan (630,000), Germany (275,000), South Korea (273,000), and Australia (259,000).
- In addition to overseas visitors, approximately 900,000 travelers came from Canada, 409,000 from Mexico by air, and another roughly 3.3 million Mexicans traveled to and through California by car.
- Spending by travelers benefits all California counties and helps diversify and stabilize rural economies, averaging \$1.4 billion per county.
- Los Angeles County receives the most tourism in the state with approximately 53.6 million domestic person trips, 2.3 million overseas visitors and total direct spending of \$17.9 billion.
- California's share of the domestic travel market in 2004 was 10.8%, making it the most visited state in America.
- Dining, shopping and entertainment are the most popular expenditure-based activities among California travelers. Sightseeing, followed by visiting theme and amusement parks, and beach and waterfront activities, are the most popular recreational pursuits.

Total Travel To and Through CA, 2004



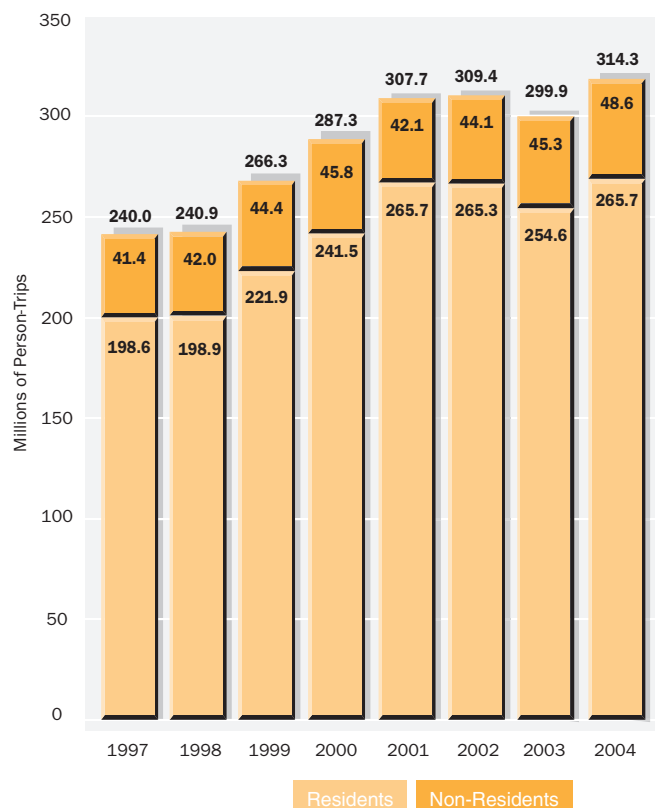
Sources: D.K. Shifflet & Associates, Ltd., CIC Research, Inc. and California Tourism, 2005

Business and Leisure Travel To and Through California



Source: D.K. Shifflet & Associates, Ltd., 2005

Resident and Non-Resident Travel To and Through California



Source: D.K. Shifflet & Associates, Ltd., 2005

Domestic Visitors to California Top Originating States (Millions of person-trips)

	2002	Volume 2003	2004
Nevada	6.1	6.6	7.9
Arizona	4.8	5.7	6.6
Texas	3.6	3.6	4.7
Oregon	3.0	3.0	2.8
New York	1.5	1.8	2.5

Source: D.K. Shifflet & Associates, Ltd., 2005

The Economic Impact of Travel

The travel industry is a major component of California's economy and a primary industry in many local communities. Spending by travelers originating in domestic and international markets generates sales for many different types of businesses in the state, employment for hundreds of thousands of residents, and substantial tax revenues for the state and for local jurisdictions. Since 1992, travel spending has grown an average of 4.1 percent per year.

During 2004, preliminary estimates show that travelers to California contributed an estimated \$82.5 billion to the state economy. This spending directly supported 892,600 jobs with total earnings of \$26.5 billion and generated \$5.2 billion in state and local tax receipts. On average, every \$92,400 of travel spending supported one job in California.

Selected Activities of Resident and Non-Resident Leisure Travelers (Millions of person-trips)

	CA Residents	Non-Residents
Dining	78.0	14.5
Shopping	62.4	11.2
Sightseeing	46.8	13.9
Theme/Amusement Parks	25.4	6.9
Nat'l/State Parks	13.7	1.7
Visit Historic Site	9.8	3.0
Camping	7.8	1.0
Golf	3.9	1.0
Skiing	3.9	0.7
Group Tour	9.8	1.0
Museum/Art Exhibit	11.7	2.3
Nature/Culture/Eco	7.8	1.3

Source: D.K. Shifflet & Associates, Ltd., 2005

California Direct Travel Impacts, 1993-2004p

Year	Spending (\$Billion)	Earnings (\$Billion)	Jobs (Thousand)	Tax Receipts		
				Local (\$Billion)	State (\$Billion)	Federal (\$Billion)
1993	53.1	16.4	765	1.1	2.1	2.9
1994	54.0	16.8	789	1.1	2.1	2.9
1995	55.4	17.3	805	1.2	2.2	2.9
1996	60.2	18.6	841	1.3	2.4	3.1
1997	65.5	20.1	880	1.5	2.6	3.3
1998	67.8	21.4	884	1.6	2.8	3.4
1999	72.2	22.9	921	1.7	2.9	3.6
2000	78.0	24.7	935	1.8	3.1	3.9
2001	74.7	24.1	868	1.7	3.0	4.1
2002	74.0	24.4	850	1.7	3.0	4.2
2003	76.7	25.1	870	1.8	3.1	4.2
2004p	82.4	26.5	892	1.9	3.3	4.5
Annual Percentage Change						
03-04p	7.4	5.6	2.5	7.6	5.3	8.3

Estimates for 2004 are preliminary. All previous estimates have been revised. Earnings include payroll, other earned income and proprietor income. Employment includes payroll employees and proprietors.

Source: Dean Runyan Associates, 2005

Overseas Visitors to California

Overseas Country of Residence	2003	2004	% change 03/04
Total Overseas	3,984,000	4,207,000	+6%
United Kingdom	693,000	693,000	-
Japan	590,000	630,000	+7%
South Korea	303,000	273,000	-10%
Australia/New Zealand	200,000	259,000	+30%
Germany	238,000	275,000	+16%

Source: CIC Research, Inc.; California Tourism, 2005

Local and State Tax Receipts Generated by Travel Spending, 2004p

(\$ Millions)	
Total Local	1,920
Transient Occupancy Tax	1,124
Local Sales	795
Total State	3,269
State Sales	2,260
State Gas Tax	485
Income Taxes	524
Total	5,189

Source: Dean Runyan Associates, 2005

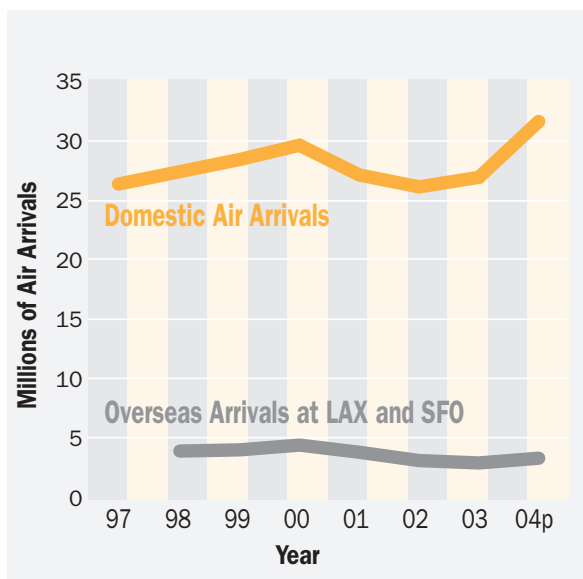
California Travel Impacts, 1993-2004p

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004p
Total Direct Travel Spending (\$Billion)												
Visitor Spending at Destination	46.7	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0
Other Travel	6.3	6.1	5.7	6.0	6.3	6.0	6.0	6.7	6.4	6.0	5.8	6.5
Total Direct Spending	53.1	54.0	55.4	60.2	65.5	67.8	72.2	78.0	74.7	74.0	76.8	82.5
Visitor Spending by Type of Traveler Accommodation (\$Billion)												
Hotel, Motel	21.6	22.1	23.2	25.9	28.9	31.0	33.7	36.6	35.1	34.6	36.3	39.4
Private Campground	1.7	1.8	1.8	2.1	2.4	2.2	2.3	2.5	2.6	2.6	2.7	2.8
Public Campground	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.6
Private Home	8.1	8.2	8.3	8.7	9.0	9.2	9.5	10.2	10.0	10.0	10.3	10.8
Vacation Home	2.4	2.5	2.5	2.6	2.7	2.7	2.8	2.9	3.0	3.1	3.2	3.3
Day Travel	12.5	12.9	13.4	14.5	15.7	16.2	17.3	18.5	17.0	17.1	18.0	19.0
Spending at Destination	46.7	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0
Visitor Spending by Commodity Purchased (\$Billion)												
Accommodations	7.3	7.6	8.0	8.9	9.9	10.6	11.5	12.6	12.1	11.6	11.9	12.8
Food & Beverage Services	10.9	11.2	11.7	12.6	13.9	14.7	15.7	16.4	15.8	16.4	17.2	18.4
Food Stores	1.5	1.6	1.7	1.8	2.0	2.1	2.2	2.3	2.3	2.3	2.4	2.6
Ground Tran. & Motor Fuel	6.1	6.3	6.5	7.1	7.7	7.4	8.3	9.7	9.1	8.7	10.2	11.8
Arts, Entertainment & Recreation	8.1	8.3	8.8	9.5	10.4	11.0	11.8	12.4	12.0	12.2	12.6	13.2
Retail Sales	9.5	9.8	10.3	11.2	12.2	12.8	13.7	14.4	13.8	13.7	13.8	14.0
Air Transportation (visitor only)	3.3	3.1	2.8	3.0	3.1	3.0	3.1	3.4	3.1	3.0	2.8	3.2
Spending at Destination	46.7	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0
Industry Earnings Generated by Travel Spending (\$Billion)												
Accommodations & Food Service	6.9	7.1	7.4	8.2	9.0	9.8	10.6	11.5	10.9	11.3	12.0	12.8
Arts, Entertainment & Recreation	4.0	4.1	4.3	4.7	5.1	5.4	5.8	6.1	5.9	6.0	6.2	6.5
Retail (incl. Motor Fuel)	1.6	1.7	1.7	1.7	1.9	2.0	2.1	2.3	2.4	2.4	2.4	2.6
Auto Rental & other ground tran.	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.5	0.4	0.5	0.5	0.5
Air Transportation (visitor only)	0.8	0.7	0.7	0.7	0.7	0.8	0.8	0.9	1.0	1.0	0.9	0.9
Other Travel	2.9	2.9	2.8	2.9	2.9	3.0	3.1	3.5	3.6	3.4	3.1	3.2
Total Direct Earnings	16.4	16.8	17.3	18.6	20.1	21.4	22.9	24.7	24.1	24.4	25.1	26.5
Industry Employment Generated by Travel Spending (Thousand jobs)												
Accommodations & Food Service	392.2	401.9	411.9	437.1	456.2	466.1	489.6	505.1	461.6	463.9	486.4	504.0
Arts, Entertainment & Recreation	196.4	209.0	211.9	220.5	236.7	230.5	241.5	239.6	221.9	214.9	218.0	220.5
Retail (incl. Motor Fuel)	82.1	84.1	86.1	84.7	87.3	87.5	89.3	87.3	86.5	84.7	86.6	89.5
Auto Rental & other ground tran.	11.5	13.2	14.1	15.6	17.6	16.4	16.4	16.5	15.1	15.0	14.9	14.8
Air Transportation (visitor only)	16.5	15.5	15.7	16.2	16.1	17.0	17.6	18.2	17.5	15.4	13.5	13.2
Other Travel	66.8	65.0	65.4	66.4	66.0	67.1	66.9	67.9	64.9	56.6	51.6	50.6
Total Direct Employment	765.4	788.6	805.1	840.6	880.0	884.5	921.3	934.6	867.6	850.5	871.0	892.6
Tax Receipts Generated by Travel Spending (\$Billion)												
Local Tax Receipts	1.1	1.1	1.2	1.3	1.5	1.6	1.7	1.8	1.7	1.7	1.8	1.9
State Tax Receipts	2.1	2.1	2.2	2.4	2.6	2.8	2.9	3.1	3.0	3.0	3.1	3.3
Federal Tax Receipts	2.9	2.9	2.9	3.1	3.3	3.4	3.6	3.9	4.1	4.2	4.2	4.5
Total Direct Tax Receipts	6.0	6.1	6.3	6.8	7.4	7.7	8.2	8.8	8.8	8.9	9.1	9.7

Note: Other travel includes resident air travel and travel agency services. Total earnings include wage & salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors. Estimates for 2004 are preliminary (p). Local tax receipts include transient occupancy taxes and local sales taxes. State tax receipts include state sales taxes, motor fuel tax, and personal and corporate income taxes. Property taxes are not included. These estimates supersede all previous estimates released by California Tourism. Details may not add to totals due to rounding.

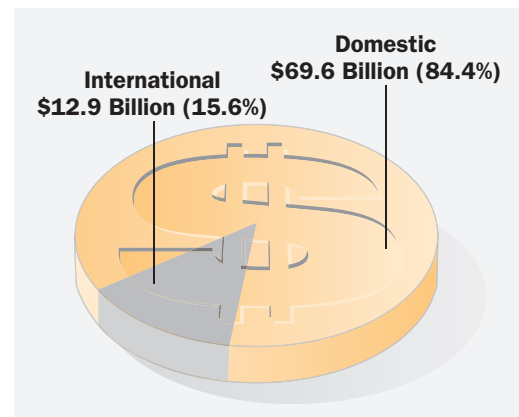
Source: Dean Runyan Associates, 2005

California Air Arrivals 1997-2004



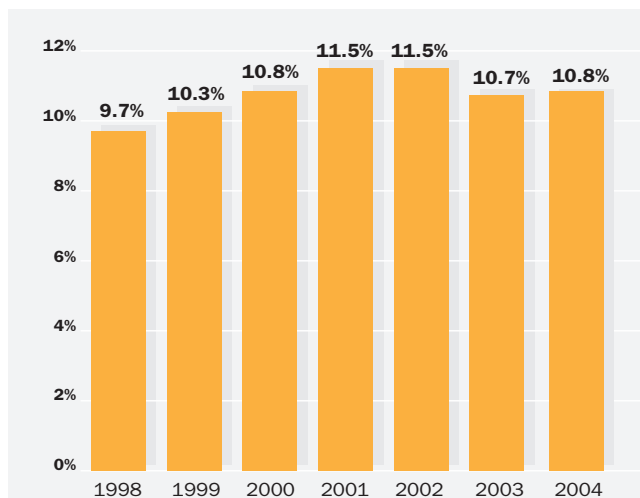
Source: Dean Runyan Associates, 2005; Bureau of Transportation Statistics; INS; California Tourism preliminary 2004 estimates based on January through November.

Domestic vs. International Travel Spending in California, 2004 (Percent of destination spending)



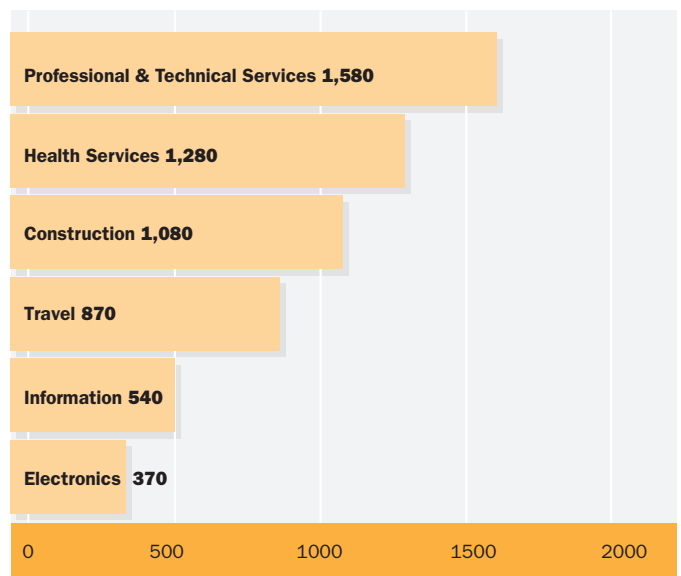
Note: International air fares not included.
Source: Dean Runyan Associates, 2005, Bureau of Economic Analysis and International Trade Administration, U.S. Department of Commerce

California's Share of the U.S. Travel Market, 1998-2004



Source: D.K. Shifflet & Associates, Ltd., 2005

Industry Employment in California, 2003



Professional & Technical Services corresponds to NAICS Sector 54, Health Services – NAICS subsectors 621, 622, 623; Construction – Sector 23, Information – sector 51, Electronics – subsectors 334 and 335.
Source: Dean Runyan Associates, 2005, and U.S. Bureau of Economic Analysis

Impacts Generated by Travel Spending in California

	1998	1999	2000	2001	2002	2003	2004
Amount of Travel Spending to Support 1 Job	\$74,900	\$76,850	\$81,670	\$85,260	\$85,780	\$87,440	\$92,400
Tax Revenue Generated by \$100 Travel Spending							
Local	\$2.31	\$2.33	\$2.36	\$2.30	\$2.28	\$2.30	\$2.33
State	\$4.04	\$4.01	\$3.96	\$3.93	\$4.01	\$4.03	\$3.97

Source: Dean Runyan Associates, 2005

Total Travel Spending by County, 1993-2003 (\$Millions)

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Alameda	1,570.7	1,583.2	1,633.6	1,801.6	1,955.2	2,032.6	2,289.9	2,629.5	2,400.1	2,280.2	2,311.2
Alpine	17.9	18.3	18.5	20.6	22.4	22.2	24.0	24.7	25.9	26.8	26.7
Amador	55.1	57.2	61.5	67.7	72.5	70.6	74.8	80.1	92.7	100.1	101.6
Butte	136.2	146.4	153.0	159.6	163.1	169.9	179.4	193.0	191.8	194.0	201.9
Calaveras	88.7	93.9	97.6	100.3	104.5	107.8	117.1	120.8	125.1	127.4	131.9
Colusa	27.4	27.9	28.0	29.1	29.3	31.4	33.4	36.5	36.5	36.8	37.9
Contra Costa	653.7	675.3	705.6	754.9	830.4	873.0	943.7	1,038.7	977.5	942.7	997.5
Del Norte	68.1	70.5	68.9	72.4	77.0	73.8	79.2	81.4	82.6	84.1	84.9
El Dorado	438.1	449.8	455.7	462.1	484.4	502.1	528.1	541.2	542.5	552.2	595.2
Fresno	613.9	627.3	639.2	672.3	702.7	717.6	753.6	824.6	814.5	813.7	863.6
Glenn	27.4	28.6	29.7	31.8	32.9	33.8	36.1	39.4	38.9	39.1	41.4
Humboldt	192.8	197.8	202.3	205.0	210.0	212.5	228.5	241.6	240.1	244.3	248.6
Imperial	162.3	168.4	171.7	185.9	216.8	206.1	215.8	237.4	237.1	240.9	250.4
Inyo	111.9	113.0	119.4	127.4	139.1	137.5	142.5	150.3	148.7	155.7	162.7
Kern	701.9	718.6	704.2	744.0	812.7	813.0	834.8	897.2	889.9	882.3	923.2
Kings	71.5	74.2	77.3	81.8	86.7	90.0	96.1	105.0	104.3	107.4	112.0
Lake	94.7	98.0	101.6	105.9	109.9	110.5	119.0	128.0	135.1	137.7	139.9
Lassen	39.3	40.3	41.7	43.3	43.9	46.0	48.0	51.6	54.0	55.1	55.4
Los Angeles	13,304.2	13,305.4	13,453.2	14,510.9	15,572.3	15,913.5	16,822.3	18,258.4	17,478.5	17,240.2	17,935.9
Madera	113.6	119.5	125.5	135.5	142.9	143.0	153.3	163.0	165.8	168.7	175.5
Marin	338.1	351.3	369.2	397.2	437.1	458.6	504.8	550.8	529.7	526.8	528.7
Mariposa	191.5	212.4	210.7	194.4	208.3	225.1	231.5	241.5	260.6	269.5	277.0
Mendocino	206.8	216.9	229.6	230.9	240.5	250.0	266.6	286.1	286.2	294.4	294.0
Merced	117.3	119.7	118.8	119.9	124.9	128.0	138.7	152.7	150.7	150.4	160.6
Modoc	13.0	13.3	13.8	14.4	14.7	15.3	15.8	17.2	17.7	17.8	18.7
Mono	193.0	201.4	206.6	209.3	232.8	245.0	271.5	292.6	317.8	328.2	354.9
Monterey	1,222.4	1,250.3	1,326.2	1,467.6	1,574.1	1,645.1	1,813.9	1,887.1	1,856.8	1,834.5	1,843.8
Napa	373.8	411.0	452.8	490.4	538.5	572.7	592.0	633.7	647.0	663.4	666.4
Nevada	155.4	159.4	162.0	172.9	184.5	184.9	201.4	217.0	221.8	225.5	230.7
Orange	4,401.2	4,586.3	4,795.0	5,151.5	5,541.2	5,693.0	5,893.5	6,398.9	6,304.4	6,338.2	6,836.7
Placer	370.6	397.6	417.7	433.9	473.9	514.7	541.3	563.0	569.4	586.5	606.2
Plumas	69.5	71.3	73.8	76.6	77.4	82.8	84.5	89.7	95.2	97.3	98.1
Riverside	3,103.7	3,210.1	3,330.3	3,580.7	3,949.4	4,000.6	4,292.1	4,529.5	4,620.4	4,728.2	4,903.9
Sacramento	1,287.3	1,328.4	1,381.9	1,468.0	1,584.2	1,655.5	1,758.5	1,944.1	1,932.1	1,958.4	2,014.0
San Benito	50.6	50.7	52.1	57.5	62.1	64.1	70.0	75.2	73.9	73.8	75.5
San Bernardino	2,005.0	2,051.5	2,086.8	2,206.3	2,383.4	2,399.5	2,548.4	2,736.8	2,736.8	2,773.4	2,931.5
San Diego	5,314.8	5,299.5	5,463.6	6,292.0	7,209.6	7,755.6	8,220.7	8,872.6	8,571.3	8,593.8	9,013.5
San Francisco	6,681.5	6,647.9	6,638.3	7,293.0	7,875.4	8,027.5	8,665.5	9,228.2	8,178.2	7,897.7	8,064.5
San Joaquin	318.2	325.6	330.6	338.7	358.2	370.3	400.3	462.3	460.7	459.4	488.0
San Luis Obispo	658.4	633.5	635.3	690.5	735.2	774.6	834.5	909.9	896.7	902.3	930.5
San Mateo	1,404.0	1,498.0	1,631.9	1,820.8	2,034.4	2,135.4	2,245.9	2,384.7	2,038.2	1,971.9	2,024.2
Santa Barbara	791.7	821.7	855.9	906.8	971.3	1,024.0	1,097.2	1,169.4	1,167.8	1,178.6	1,218.9
Santa Clara	1,999.3	2,106.8	2,280.7	2,592.1	2,950.1	3,170.9	3,408.2	3,763.8	3,283.6	3,030.2	2,988.0
Santa Cruz	377.7	381.5	399.0	425.3	457.0	475.5	527.6	549.3	531.1	505.2	530.9
Shasta	219.4	224.4	227.4	236.7	243.6	255.4	266.1	289.6	286.8	292.5	305.0
Sierra	10.0	11.4	11.8	12.3	13.0	13.7	14.6	15.5	15.9	16.3	16.5
Siskiyou	97.4	99.9	103.9	109.1	113.3	121.0	124.1	133.1	143.6	147.1	150.7
Solano	328.4	334.9	342.8	361.9	391.8	403.3	438.6	494.6	467.5	455.2	479.6
Sonoma	684.6	703.0	734.3	785.3	842.3	888.8	943.0	1,005.3	986.6	990.4	1,016.6
Stanislaus	243.8	252.4	259.9	269.7	279.1	282.9	305.0	341.2	339.3	339.8	358.6
Sutter	44.3	44.7	45.4	48.0	49.5	49.6	53.3	59.3	58.2	58.9	60.6
Tehama	65.8	68.0	69.6	73.7	76.3	80.7	83.3	89.3	92.3	93.5	96.1
Trinity	31.7	32.5	33.4	35.0	36.0	38.9	39.5	41.1	43.2	44.0	45.1
Tulare	200.2	204.8	209.2	218.1	230.9	240.3	250.8	271.2	274.5	284.0	295.2
Tuolumne	105.0	107.1	106.3	109.9	118.2	122.9	130.5	136.1	138.2	140.4	143.9
Ventura	722.9	736.3	752.6	802.5	851.5	891.4	970.3	1,071.2	1,028.0	1,024.7	1,047.6
Yolo	136.7	138.0	141.0	148.7	157.4	163.5	178.4	198.0	192.6	189.6	203.3
Yuba	40.8	40.4	44.2	47.6	48.3	47.7	51.3	57.0	57.1	57.0	60.9
California	53,065.6	53,957.7	55,432.9	60,201.5	65,478.1	67,775.8	72,192.8	78,001.1	74,653.6	73,967.7	76,782.0

Source: Dean Runyon Associates, 2005

California's Top Attractions

Top California Theme Parks (Based on 2004 attendance)

Disneyland, Anaheim	13,360,000
Disney's California Adventure	5,630,000
Universal Studios Hollywood TM	5,000,000
SeaWorld, San Diego	4,000,000
Knott's Berry Farm, Buena Park	3,580,000
San Diego Zoo	3,200,000
Santa Cruz Beach Boardwalk, Santa Cruz	3,000,000
Six Flags Magic Mountain, Valencia	2,700,000
Monterey Bay Aquarium, Monterey	1,947,600
Paramount's Great America, Santa Clara	1,930,000
San Diego Zoo's Wild Animal Park	1,500,000
Six Flags Marine World, Vallejo	1,450,000
Legoland, Carlsbad	1,430,000

Sources: *Amusement Business* (Year-End Issue, 2004), Monterey Bay Aquarium, San Diego Zoo and Wild Animal Park

Top Ten National Park Facilities (Based on 2004 visitation)

Golden Gate National Recreation Area	13,270,547
San Francisco Maritime Museum	4,031,353
Yosemite National Park	3,272,152
Point Reyes National Seashore	1,927,271
Fort Point National Historic Site	1,660,002
Joshua Tree National Park	1,243,659
Cabrillo National Monument	883,930
Death Valley National Park	738,522
Sequoia National Park	1,000,177
Whiskeytown-Shasta-Trinity National Recreation Area	745,184

Source: National Park Service, 2005

Top Ten State Parks (Based on 2003/2004 fiscal year visitation)

Old Town San Diego State Historic Park	5,184,311
Huntington State Beach	2,750,682
Sonoma Coast State Beach	2,612,758
San Onofre State Beach	2,799,897
Seacliff State Beach	2,503,230
Bolsa Chica State Beach	2,825,583
Doheny State Beach	2,041,435
Carlsbad State Beach	1,547,896
Big Basin Redwoods State Park	903,345
Morro Bay State Park	1,224,865

Source: California State Parks, 2004



Mt. Lassen, Lassen Volcanic National Park

Robert Holmes/California Tourism

Main Mode of Transportation, 2004 (% of Person-trips)

	All California Travel			California Leisure Travel	
	Total	Business	Leisure	Residents	Non-Residents
Vehicular					
Auto	69	59	73	78	42
Van/Small Truck	10	9	10	10	11
Camper/RV	2	1	2	2	3
Air Travel	11	19	8	2	39
Bus/Train	3	3	2	3	1

Source: D.K. Shifflet & Associates, Ltd., 2005

California Tourism Visitor Inquires vs Website Visitors 2000-2004

	Visitor Inquiries (Packet Requests) ^a	Web Visitors (Unique visitors) ^b
2000	230,929	944,726
2001	157,957	1,179,684
2002	125,167	1,039,356
2003	163,946	1,158,089
2004	150,925	1,082,687

Source: California Tourism, 2005

(a) From 800 #s, mail and online.

(b) Multiple visits by same individual during one month only counted once.

Trends in Tourism

- Major factors influencing travel in 2004 and expected to carry over to 2005 and beyond:
 - Improved consumer confidence about job stability and personal finances generated gains in leisure travel;
 - Continued low inflation, high productivity, and expanded service by low fare carriers boosted domestic travel to the highest level in several years, with especially strong gains for business travel;
 - Travel from Asia resumed as the SARS fright of 2003 faded into the past;
 - The strong euro and diminished anxiety about air security stimulated travel from Europe;
 - California Tourism budget dropped from 10th place to 24th place after state allocation eliminated in June 2003; full marketing burden now rests on private sector CTC; advertising and promotion spending curtailed;¹
 - Traveling public adjusts to new rules, restrictions and realities of the Post 911 era.
- TIA's Suzanne Cook, speaking at the October 2004 Travel Industry Association Outlook Forum, announced her forecast that two of the hardest-hit segments in the travel industry, domestic business travel and international inbound travel, will both see their first increases since before September 11, 2001. On business travel, "The gains have been driven primarily by a stronger economy and fewer travel restrictions by corporate America." TIA estimates for 2004 put domestic travel 3% ahead of 2003 and international travel growth at 7.5%, with forecasts of 2% and 4.8% respectively for 2005.
- California forecasts by DK Shifflet and Associates, Ltd. anticipate that total travel to and through California during the Spring and Summer seasons will increase 2.9 and 3.5 percent respectively in 2005, with resident travel up 2.4% in Summer, while non-resident travel to California will remain about the same as in 2004.
- California's average statewide hotel occupancy of 66.5% exceeded the national average of 61.3% and was 4.4% above the previous year. The state's lodging inventory increased from 5,324 to 5,420 properties, and by approximately 5,700 rooms.²
- From Bruce Baltin, PKF Consulting, "Markets such as Los Angeles, San Diego, and Ontario have historically performed well, and are anticipated to continue to do so even as new supply is added." Baltin attributes the stagnation in new property openings in Northern California to the effects of the technology downturn, but expects the region to improve. San Francisco is forecast to see occupancy growth of 3.6 percent, with an average daily rate growth of 6.0 percent in 2005.³
- The number of visitors stopping in at California Welcome Centers in 2004 increased 35.6% over 2003, with six out of the ten centers that were in full operation both years showing gains.⁴
- Domestic and international air arrivals showed consistent gains throughout 2004, the first positive year since 2000 for LAX and since 2001 for SFO. San Diego posted increases in domestic arrivals, but its modest volume of international passengers fell due to the withdrawal of Air Canada and British Air.
- International visitor arrivals at California ports of entry through November 2004 were up 12.3%. The strong year-over-year growth of the first half of the year began tapering off in July.⁵
- The emerging markets of China and India will have very significant impacts on California in the years ahead. In 2004, Chinese outbound travel generated more than 19 million arrivals worldwide, surpassing Japan. Chinese visitors to the US already rank high in per capita spending, with expenditures of \$2,413 per party per trip. In 1999, India became one of the top 25 tourism generators to the US for the first time, and within three years jumped to 13th place.⁶

¹ 2003-2004 Survey of U.S. State & Territory Office Budgets, Travel Industry Association

² Monthly Reports, California Tourism, Smith Travel Research

³ California Lodging Outlook, Bruce Baltin, PKF Consulting, November 2004

⁴ California Tourism

⁵ CIC Research, Inc.

⁶ Emerging International Tourism Markets: Trends and Insights, 2004 Ed., Travel Industry Association of America

Economic Impact of National Park Visitation in California, 2003p

Park Name	Recreation Visits		Spending		Direct Effects		Total Effects	
	Recreation Visits	Party Days	Avg. Spending per Party Day	Total Visitor Spending (\$Million)	Sales (\$Million)	Jobs	Sales (\$Million)	Jobs
Cabrillo NM	1,004,280	502,205	\$115	\$57.50	\$48.10	1,071	\$74.80	1,414
Channel Islands NP	585,919	344,748	\$137	\$47.10	\$39.70	870	\$62.00	1,157
Death Valley NP	890,375	542,704	\$74	\$40.10	\$32.80	937	\$43.50	1,102
Devils Postpile NM	118,550	60,107	\$62	\$3.70	\$3.00	86	\$3.90	101
Eugene O'Neill NHS	2,672	1,337	\$115	\$0.20	\$0.10	3	\$0.20	4
Fort Point NHS	1,596,933	798,569	\$115	\$91.50	\$76.50	1,702	\$119.00	2,248
Golden Gate NRA	13,854,750	5,257,245	\$44	\$226.80	\$177.00	4,107	\$271.10	5,301
John Muir NHS	26,578	13,291	\$115	\$1.50	\$1.30	29	\$2.00	38
Joshua Tree NP	1,283,346	600,620	\$80	\$48.00	\$39.20	877	\$60.70	1,153
Lassen Volcanic NP	404,384	182,325	\$73	\$13.20	\$10.30	232	\$15.90	304
Lava Beds NM	119,515	60,750	\$88	\$5.30	\$4.40	109	\$6.40	137
Manzanar NHS	61,917	30,963	\$62	\$1.90	\$1.50	45	\$2.00	53
Mojave Npres	615,269	268,721	\$25	\$6.70	\$4.90	129	\$7.00	158
Muir Woods NM	719,350	359,722	\$115	\$41.20	\$34.50	767	\$53.60	1,013
Pinnacles NM	162,791	37,985	\$80	\$3.00	\$2.30	67	\$3.00	78
Point Reyes NS	2,224,882	879,313	\$99	\$86.70	\$69.90	1,576	\$108.10	2,065
Redwood NP	408,126	166,948	\$84	\$13.90	\$11.00	276	\$16.00	345
San Francisco Maritime NHP	3,984,826	1,511,223	\$49	\$73.40	\$56.70	1,325	\$86.70	1,705
Santa Monica Mountains NRA	447,776	59,704	\$145	\$8.60	\$7.40	163	\$11.50	216
Sequoia NP/ Kings Canyon NP	1,221,695	576,998	\$125	\$72.00	\$62.00	1,365	\$99.50	1,822
Whiskeytown-Shasta-Trinity NRA	750,951	356,863	\$75	\$26.70	\$21.20	534	\$30.70	667
Yosemite NP	3,378,664	2,757,118	\$120	\$329.30	\$270.70	7,698	\$360.20	9,065

NM: National Monument; NHS: National Historic Site; NRA: National Recreation Area; NP: National Park; NS: National Seashore; NHP: National Historical Park; NPRES: National Monument & Preserve. Source: National Park Service

Regional Information



North Coast

The North Coast changes moods with the weather. From sunny vineyards to misty forests to the foggy coast, it is a place out of the past yet bursting with the future. The North Coast region retains a mix of pastoral and wilderness character that once epitomized much of the state. The region includes the counties of Sonoma, Mendocino, Lake, Humboldt, and Del Norte.

Two California Welcome Centers are located in the North Coast region, at Santa Rosa and Arcata.



Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
Sonoma	7.39 million	1.73 million	5.65 million
Humboldt*	1.26 million	0.22 million	1.04 million
Mendocino*	2.23 million	0.27 million	1.96 million

Source: D.K. Shifflet & Associates, Ltd., 2004

* Avg. 2001-2003

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Humboldt County	CA Leisure Travel to Mendocino County	CA Leisure Travel to Sonoma County
Avg. length of stay (all trips)	2.0 nights	1.1 nights	1.0 nights
Avg. length of overnight stay	2.7 nights	2.6 nights	2.2 nights
Avg. party size	3.6 persons	2.9 persons	2.9 persons
% Traveling with children	33%	22%	16%
% Day trips	19%	48%	50%
Mean household income	\$55,000	\$82,800	\$69,400
Used rental car	8%	7%	10%
Top states of origin	Oregon, 9% Washington, 5%	Oregon, 3% Arizona, 2%	Washington, 2%

Source: D.K. Shifflet & Associates, Ltd., 2002

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Sonoma County	\$79.30	\$59.60	\$85.10	\$82.40	\$120.50

Source: D.K. Shifflet & Associates, Ltd., 2004

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
California North	61.7%	1.0%	\$78.47	3.3%	622	32,708
California North Area	60.6%	1.3%	\$65.08	3.2%	260	10,965
Eureka/Crescent City	59.6%	3.3%	\$64.80	5.9%	74	3,310
Santa Rosa-Petaluma	59.1%	3.3%	\$97.78	0.5%	81	5,471

Source: Smith Travel Research, 2005

Robert Holmes/California Tourism



Population of Cities (2004)

- Eureka26,250
- Crescent City7,550
- Santa Rosa154,400

National Park

- **Redwood National Park**
2004 Attendance 391,281

State Parks

- **Jedediah Smith State Park**
Attendance 138,784*
- **Del Norte Coast Redwoods State Park**
Attendance 112,896*
- **Prairie Creek Redwoods State Park**
Attendance 252,853*
- **Grizzly Creek State Park**
Attendance 30,473*
- **Humboldt Redwoods State Park**
Attendance 482,246*
- **Sonoma Coast State Beach**
Attendance 2,612,758*

*2003/2004 fiscal year



Shasta Cascade

The Shasta Cascade is an outdoor recreation wonderland. Volcanic landscapes and dense forests provide a scenic venue for camping, hiking, biking, hunting, fishing, swimming, boating, water-skiing, snow shoeing, downhill and cross-country skiing, birding and wildlife viewing. The region includes Siskiyou, Modoc, Trinity, Shasta, Lassen, Tehama, Plumas and Butte Counties.

The California Welcome Center, Anderson is located adjacent to Interstate 5.



Shasta Lake, fishing

Robert Holmes/California Tourism

Population of Cities (2004)

- Redding 87,300
- Yreka 7,325
- Oroville 13,350

National Parks

- Whiskeytown-Shasta-Trinity National Recreation Area
2004 attendance 745,184
- Lassen Volcanic National Park
2004 attendance 379,519
- Lava Beds National Monument
2004 attendance 107,410

State Parks

- Castle Crags State Park
Attendance 41,623*
- Plumas-Eureka State Park
Attendance 58,984*
- McArthur-Burney Falls State Park
Attendance 190,400*
- Lake Oroville State Recreation Area
Attendance 1,155,048*

*2003/2004 fiscal year

Domestic Visitor Volume

	Avg. Annual County Volume 2001-2003 (person-trips)	Business Travel	Leisure Travel
Shasta	1.99 million	0.41 million	1.58 million
Butte	2.23 million	0.49 million	1.74 million

Source: D.K. Shifflet & Associates, Ltd., 2004

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Shasta County
Avg. length of stay (all trips)	1.5 nights
Avg. length of overnight stay	2.7 nights
Avg. party size	2.9 persons
% Traveling with children	32%
% Day trips	43%
Mean household income	\$54,600
Used rental car	7%
Top states of origin	Oregon, 10% Washington, 6%

Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
California North	61.7%	1.0%	\$78.47	3.3%	622	32,708
Redding/Chico	62.8%	0.8%	\$62.75	3.1%	68	4,316

Source: Smith Travel Research, 2005

San Francisco Bay Area

The San Francisco Bay Area is a feast for the senses. The dramatic landscape, the fog and sun climate and the multicultural medley of the diverse neighborhoods all contribute to make a uniquely California blend. The region encompasses the counties of San Francisco, San Mateo, Santa Cruz, Alameda, Marin, and Napa; northern Santa Clara County, and western Contra Costa and Solano counties.

A California Welcome Center is located at PIER 39 in San Francisco.

Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
San Francisco/ San Mateo	27.19 million	8.51 million	18.65 million
Alameda	11.97 million	4.79 million	7.18 million
Santa Cruz	4.65 million	0.35 million	4.33 million
Contra Costa*	3.31 million	0.84 million	2.47 million
Napa	3.87 million	0.35 million	3.51 million
Santa Clara	11.31 million	3.93 million	7.36 million

Source: D.K. Shifflet & Associates, Ltd., 2005

* Avg. 2001-2003

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to San Francisco County	CA Leisure Travel to Alameda County
Avg. length of stay (all trips)	1.5 nights	1.4 nights
Avg. length of overnight stay	3.2 nights	3.3 nights
Avg. party size	3.1 persons	2.6 persons
% Traveling with children	18%	21%
% Day trips	48%	56%
Mean household income	\$67,600	\$63,100
Used rental car	23 %	10%

Source: D.K. Shifflet & Associates, Ltd., 2002

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
San Francisco County	\$126.40	\$151.90	\$115.00	\$113.10	\$117.20
Santa Clara County	\$75.40	\$92.90	\$65.20	\$63.50	\$72.00
Alameda County	\$70.60	\$73.20	\$68.40	\$73.60	\$54.20
Solano County	\$95.50	\$77.30	\$99.40	\$107.10	\$65.00
Santa Cruz County	\$70.10	\$89.30	\$68.70	\$73.30	\$46.90

Source: D.K. Shifflet & Associates, Ltd., 2005

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Oakland	58.3%	7.2%	\$83.19	-1.4%	240	24,430
San Francisco/San Mateo	68.0%	8.3%	\$117.96	1.1%	404	51,450
San Jose-Santa Clara	58.2%	7.8%	\$96.51	-2.9%	320	30,266
Vallejo-Fairfield-Napa	64.9%	-2.0%	\$95.80	4.8%	139	8,655

Source: Smith Travel Research, 2005



Robert Holmes/California Tourism



Population of Cities (2004)

- **San Francisco** . . **792,700**
- **Oakland** **411,600**
- **Santa Cruz** **56,300**
- **Napa** **75,900**

Theme Parks

- **Santa Cruz Beach Boardwalk**
2004 attendance 3,000,000
- **Six Flags Marine World**
2004 attendance 1,450,000
- **Paramount's Great America**
2004 attendance 1,930,000

National Parks

- **Golden Gate National Recreation Area**, 2004 attendance 13,270,547
- **San Francisco Maritime Museum**
2004 attendance 4,031,353
- **Point Reyes National Seashore**
2004 attendance 1,927,271
- **Fort Point National Historical Site**
2004 attendance 1,660,002
- **Muir Woods National Monument**
2004 attendance 766,547

State Parks

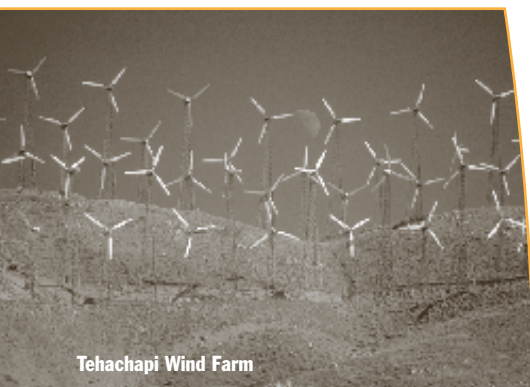
- **Mount Tamalpais State Park** Attendance 561,381*
- **Seacliff State Beach**
Attendance 2,503,230*

*2003/2004 fiscal year

Central Valley

Bound by the gently rolling hills of the Coast Range to the west and the Sierra foothills to the east, the Central Valley's fertile land provides 25% of the country's table food. The inland fingers of the Delta, and the many rivers, lakes and reservoirs of the valley offer numerous water recreation opportunities. The region includes Glenn, Colusa, Yolo, Yuba, Sutter, San Joaquin, Stanislaus, Merced, and Kings counties; the northwestern portion of Kern County; western portions of Tulare, Madera, and Fresno counties, the northeastern portion of Solano County, and the eastern portion of Contra Costa County.

The California Welcome Center, Merced is a convenient stop for travelers in the Central Valley.



Robert Holmes/California Tourism

Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
Kern	6.51 million	2.73 million	4.15 million
Fresno	5.63 million	1.84 million	3.76 million
San Joaquin	4.18 million	1.02 million	3.15 million
Merced	3.33 million	0.63 million	2.51 million
Stanislaus	2.77 million	1.11 million	1.66 million

Source: D.K. Shifflet & Associates, Ltd., 2004

*Avg. 2001-2003

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Kern County	\$71.90	\$75.60	\$68.70	\$68.80	\$68.10
Solano County	\$95.50	\$77.30	\$99.40	\$107.10	\$65.00
Fresno County	\$58.00	\$64.40	\$54.20	\$55.60	\$35.60
San Joaquin	\$70.10	\$74.20	\$69.10	\$79.00	\$49.50

Source: D.K. Shifflet & Associates, Ltd., 2004

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Fresno County	CA Leisure Travel to San Joaquin County
Avg. length of stay (all trips)	1.3 nights	1.0 nights
Avg. length of overnight stay	2.4 nights	2.1 nights
Avg. party size	2.9 persons	2.9 persons
% Traveling with children	27%	30%
% Day trips	44%	51%
Mean household income	\$58,000	\$60,000
Used rental car	7%	7%
Top states of origin	Washington, 3% Texas/Nevada, 2% each	Oregon/Washington, 4% each Texas, 3%

Source: D.K. Shifflet & Associates, Ltd., 2002

Population of Cities (2003)

- **Fresno** 456,100
- **Bakersfield** 279,700
- **Stockton** 269,100
- **Modesto** 206,200

State Parks

- **Brannan Island State Recreation Area**
Attendance 118,667*
- **San Luis Reservoir State Recreation Area**
Attendance 548,177*
- **Millerton Lake State Recreation Area**
Attendance 448,411*
- **Fort Tejon State Historic Park**
Attendance 42,207*

*2003/2004 fiscal year

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Bakersfield	61.6%	2.8%	\$56.49	2.8%	117	8,905
Fresno	63.6%	1.4%	\$60.30	4.5%	114	8,771
Tulare/Visalia	62.3%	4.7%	\$63.94	1.7%	88	4,968
Stockton	63.4%	-1.1%	\$62.88	1.8%	100	6,703
Vallejo-Fairfield-Napa	64.9%	-2.0%	\$95.80	4.8%	139	8,655

Source: Smith Travel Research, 2005

Gold Country

The discovery of gold in the American River at Coloma in 1848 identified California as the land of golden opportunity. Today, the region is a blend of contemporary culture and pioneer beginnings. The Gold Country region includes all of Sacramento and Sierra counties, western portions of Nevada, Placer, El Dorado, Amador, Calaveras and Tuolumne counties, and eastern Madera County.

The California Welcome Center, Auburn is located adjacent to Interstate Highway 80.



Domestic Visitor Volume

	Avg. Annual County Volume 2001-2003 (person-trips)	Business Travel	Leisure Travel
Sacramento	14.57 million	4.92 million	9.65 million
El Dorado	4.89 million	580,000	4.31 million
Placer	2.25 million	300,000	1.95 million
Madera	940,000	90,000	850,000

Source: D.K. Shifflet & Associates, Ltd., 2004

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Sacramento County	\$73.70	\$89.90	\$64.40	\$71.70	\$46.50
El Dorado County*	\$87.90	\$122.20	\$85.50	\$83.80	\$101.80

Source: D.K. Shifflet & Associates, Ltd., 2005
*2003

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Sacramento County
Avg. length of stay (all trips)	1.3 nights
Avg. length of overnight stay	2.9 nights
Avg. party size	2.9 persons
% Traveling with children	26%
% Day trips	54%
Mean household income	\$66,700
Used rental car	10 %
Top states of origin	Nevada, 4% Oregon/Washington, 3% each

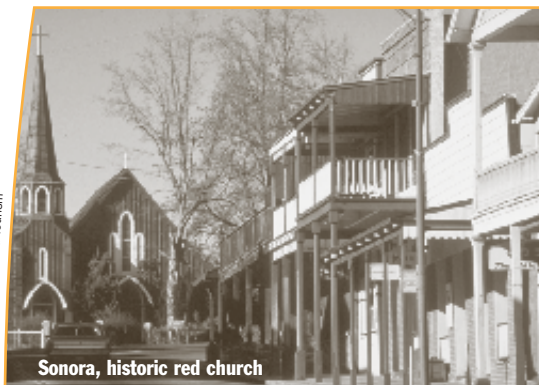
Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
California North Central	59.8%	-0.7%	\$68.95	3.6%	267	16,201
Sacramento	62.7%	2.3%	\$86.61	1.2%	294	23,133

Source: Smith Travel Research, 2005

John Poirimiro/California Tourism



Sonora, historic red church

Population of Cities (2004)

- **Sacramento** 441,000
- **Auburn** 12,650
- **Placerville** 10,150

State Parks

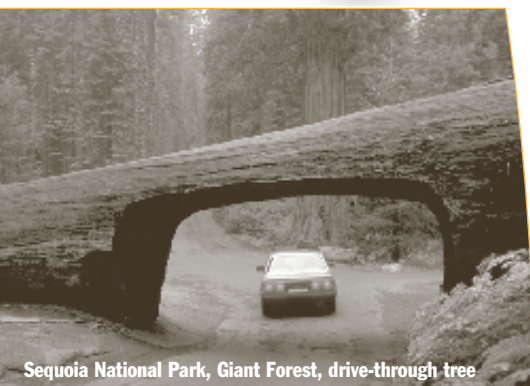
- **Folsom Lake State Recreation Area**
Attendance 1,144,966*
- **Old Sacramento State Historic Park**
Attendance 461,241*
- **Marshall Gold Discovery State Historic Park**
Attendance 350,774*
- **Columbia State Historic Park**
Attendance 520,159*
- **Empire Mine State Historic Park**
Attendance 107,776*

*2003/2004 fiscal year



High Sierra

The High Sierra is symbolic of the American wilderness. The crystal-clear high country lakes, steaming hot springs, giant sequoias and peaks of the Sierra Nevada are an outdoor enthusiast's dream. The High Sierra region includes all of Alpine, Mariposa and Mono counties, the eastern portions of Nevada, Placer, El Dorado, Amador, Calaveras, Tuolumne, Madera, Fresno and Tulare counties, the northern portion of Inyo County, and northeastern Kern County.



Robert Holmes/California Tourism

Average expenditures per person per day (less transportation) 2003

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non-Resident
El Dorado County*	\$87.90	\$122.20	\$85.50	\$83.80	\$101.80
Fresno County	\$58.00	\$64.40	\$54.20	\$56.60	\$35.60

Source: D.K. Shifflet & Associates, Ltd., 2005
*2003

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to El Dorado County
Avg. length of stay (all trips)	2.0 nights
Avg. length of overnight stay	3.2 nights
Avg. party size	3.4
% Traveling with children	28%
% Day trips	34%
Mean household income	\$71,600
Used rental car	12 %
Top states of origin	Nevada, 3% Washington, 2%

Source: D.K. Shifflet & Associates, Ltd., 2002

Population of Cities (2004)

- **Truckee** 15,000
- **S. Lake Tahoe** 23,600
- **Bishop** 3,630

National Parks

- **Yosemite National Park**
2004 attendance 3,272,152
- **Sequoia National Park**
2004 attendance 1,000,177
- **Kings Canyon National Park**
2004 attendance 526,455
- **Devil's Postpile National Monument**
2004 attendance 114,787
- **Manzanar National Historical Site**
2004 attendance 78,324

State Parks

- **Donner Memorial State Park**
Attendance 136,754*
- **Calaveras Big Trees State Park**
Attendance 189,644*
- **D.L. Bliss State Park**
Attendance 63,628*
- **Emerald Bay State Park**
Attendance 356,325*
- **Sugar Pine Point State Park**
Attendance 83,335*

*2003/2004 fiscal year

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
California North Central	59.8%	-0.7%	\$68.95	3.6%	267	16,201

Source: Smith Travel Research, 2005

Central Coast

The Central Coast is serene Missions, bucolic agricultural communities, and the dramatic meeting of ocean and land. Sometimes called the Middle Kingdom, the region is located between the San Francisco Bay Area and Southern California. It includes Ventura, Santa Barbara, San Luis Obispo, Monterey and San Benito counties, and the southern portion of Santa Clara County.

Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
Monterey	7.89 million	1.31 million	6.61 million
Santa Barbara	9.96 million	2.93 million	7.05 million
San Luis Obispo	7.89 million	2.26 million	5.61 million
Ventura	3.46 million	0.28 million	3.19 million

Source: D.K. Shifflet & Associates, Ltd., 2005

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Santa Barbara County	\$97.60	\$104.10	\$95.00	\$96.30	\$85.30
Monterey County	\$123.60	\$157.50	\$115.40	\$113.70	\$129.30
San Luis Obispo County	\$90.30	\$78.50	\$93.80	\$98.80	\$53.50

Source: D.K. Shifflet & Associates, Ltd., 2005

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Monterey County	CA Leisure Travel to San Luis Obispo County
Avg. length of stay (all trips)	1.2 nights	1.7 nights
Avg. length of overnight stay	2.2 nights	2.5 nights
Avg. party size	3.1 persons	3.1 persons
% Traveling with children	24%	24%
% Day trips	46%	29%
Mean household income	\$71,600	\$63,200
Used rental car	14 %	8%
Top states of origin	Oregon, 2%	Nevada, 2% Oregon, 1%

Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Central Coast	65.0%	1.7%	\$111.43	1.1%	550	35,078

Source: Smith Travel Research, 2005



Robert Holmes/California Tourism



Fall colors in eastern Sierra

Population of Cities (2004)

- **Monterey** 30,250
- **San Luis Obispo** . . 44,200
- **Santa Barbara** . . . 90,500
- **Oxnard** 186,100

Theme Park

- **Monterey Bay Aquarium**
2004 attendance TO COME!!!

National Park

- **Channel Islands National Park**
2004 attendance 537,716

State Parks

- **Salinas River State Beach**
Attendance 462,282*
- **Monterey State Historic Park**
Attendance 424,191*
- **Point Lobos State Reserve**
Attendance 283,752*
- **Hearst Castle™**
Attendance 779,404*
- **Pfeiffer Big Sur State Park**
Attendance 245,030*

*2003/2004 fiscal year

Los Angeles County

Movie making and the glamour of the Silver Screen fascinate the world, but Los Angeles County is much more. The region encompasses high desert, chaparral covered hillsides, sparkling beaches, snowy peaks and a sprawling metropolis, all in one county.



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Population of Cities (2003)

- Los Angeles . . . 3,912,200
- Long Beach 487,100
- Beverly Hills 35,700

Theme/Amusement Parks

- Universal Studios, Hollywood™
2004 attendance 5,000,000
- Six Flags Magic Mountain
2004 attendance 2,700,000

National Park

- Santa Monica Mountains National Recreation Area
2003 attendance 553,864

State Parks

- Topanga State Park
Attendance 569,474*

*2003/2004 fiscal year

Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
Los Angeles	53.59 million	19.19 million	34.31 million

Source: D.K. Shifflet & Associates, Ltd., 2005

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Los Angeles County	\$97.70	\$107.30	\$91.60	\$92.00	\$91.00

Source: D.K. Shifflet & Associates, Ltd., 2005

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Los Angeles County
Avg. length of stay (all trips)	1.5 nights
Avg. length of overnight stay	3.3 nights
Avg. party size	3.1 persons
% Traveling with children	25%
% Day trips	53%
Mean household income	\$61,300
Used rental car	17%
Top states of origin	Arizona, 5% Texas/Nevada, 3% each

Source: D.K. Shifflet & Associates, Ltd., 2002

Air Arrivals, LAX, 2004

Domestic	Percent change 2003:2004
22,028,905	9.5%
International	Percent change 2003:2004
8,321,784	137%

Source: City of Los Angeles Department of Airports, 2005

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Los Angeles-Long Beach	71.6%	6.2%	\$96.05	6.3%	997	97,218

Source: Smith Travel Research, 2005

Orange County

Walt Disney opened Disneyland in 1955 and pastoral Orange County was changed forever. The economic boom that followed brought luxury resorts, professional sports, shopping centers and recreation opportunities of all types.

The California Welcome Center in Santa Ana serves the millions of visitors to the region.



Domestic Visitor Volume

	Total Travel 2004 (person-trips)	Business Travel	Leisure Travel
Orange	28.22 million	4.70 million	23.55 million

Source: D.K. Shifflet & Associates, Ltd., 2004

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Orange County	\$107.70	\$112.30	\$106.80	\$110.90	\$99.40

Source: D.K. Shifflet & Associates, Ltd., 2005

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to Orange County
Avg. length of stay (all trips)	1.4 nights
Avg. length of overnight stay	3.0 nights
Avg. party size	3.7 persons
% Traveling with children	40%
% Day trips	53%
Mean household income	\$64,800
Used rental car	12%
Top states of origin	Arizona, 6% Nevada/Washington, 3% each

Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Anaheim-Santa Ana	69.5%	4.4%	\$94.86	3.8%	438	53,355

Source: Smith Travel Research, 2005

Robert Holmes/California Tourism



Balboa Beach

Population of Cities (2004)

- Anaheim 343,000
- Santa Ana 349,100
- Costa Mesa 113,000

Theme/Amusement Parks

- Disneyland
2004 attendance 13,360,000
- Disney's California Adventure
2004 attendance 5,630,000
- Knott's Berry Farm
2004 attendance 3,580,000

State Parks

- Bolsa Chica State Beach
Attendance 2,825,583*
- Huntington State Beach
Attendance 2,750,682*
- Crystal Cove State Park
Attendance 663,718*
- Doheny State Beach
Attendance 2,041,435*
- San Clemente State Beach
Attendance 833,509*

*2003/2004 fiscal year

San Diego County



San Diego reflects the blend of cultures and geography that evolved into the California of today. The Mission, the beaches, the city, the valley and the nearby mountains treat visitors to a glimpse of the old, the new, and the beautiful. A short drive takes you from the beach to wooded mountains where snow dusts the peaks in the winter. All of San Diego County except for Borrego Springs and Anza-Borrego Desert State Park is included in the San Diego County region.

The California Welcome Center, Oceanside is conveniently located on the Coast Highway.



Robert Holmes/California Tourism

Population of Cities (2004)

- San Diego 1,294,000
- Carlsbad 93,000
- Oceanside 173,300

Theme/Amusement Parks

- **SeaWorld**
2004 attendance 4,000,000
- **San Diego Zoo**
2004 attendance 3,200,000
- **Wild Animal Park**
2004 attendance 1,500,000
- **LEGOLAND**
2004 attendance 1,430,000

National Park

- **Cabrillo National Monument**
2004 attendance 883,930

State Parks

- **Old Town San Diego State Historic Park**
Attendance 5,184,311*
- **San Onofre State Beach**
Attendance 2,799,897*
- **Carlsbad State Beach**
Attendance 1,547,896*
- **Cardiff State Beach**
Attendance 1,274,876*
- **Silver Strand State Beach**
Attendance 521,361*

*2003/2004 fiscal year

Domestic Visitor Volume

	Total Travel 2004 (person-trips))	Business Travel	Leisure Travel
San Diego	43.4 million	11.81 million	30.57 million

Source: D.K. Shifflet & Associates, Ltd., 2005

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
San Diego County	\$107.90	\$122.40	\$101.20	\$98.20	\$105.80

Source: D.K. Shifflet & Associates, Ltd., 2005

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to San Diego County
Avg. length of stay (all trips)	1.4 nights
Avg. length of overnight stay	3.0 nights
Avg. party size	3.3 persons
% Traveling with children	21%
% Day trips	50%
Mean household income	\$69,300
Used rental car	10%
Top states of origin	Arizona, 8% Nevada/Washington, 3% each

Source: D.K. Shifflet & Associates, Ltd., 2002

Air Arrivals, SAN, 2004

Domestic	Percent change 2003:2004
8,097,935	8.1%
International	Percent change 2003:2004
78,682	39.6%

Source: San Diego Unified Port District
Airport Operations Department, 2005

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
San Diego	70.9%	1.9%	\$114.17	2.3%	453	53,975

Source: Smith Travel Research, 2005

Deserts

California's deserts are full of contrasts. Side by side with golf courses, tennis courts and luxury resorts are colorful geological formations, fan-palm oases, riparian wetlands, spring wildflowers, high rugged peaks and an inland saltwater sea. The Desert region includes all of Imperial County, and the eastern portions of San Bernardino, Riverside, San Diego, Kern and Inyo counties.

There are two California Welcome Centers in the Desert region. The Barstow facility provides travelers with information as they enter California through the desert. The California Welcome Center in Yucca Valley serves desert visitors to the Palm Springs and Joshua Tree National Park area.



Domestic Visitor Volume

	Avg. Annual County Volume 2001-2003 (person-trips)	Business Travel	Leisure Travel
Riverside	15.51 million	2.74 million	12.77 million
San Bernardino	11.85 million	2.62 million	9.23 million

Source: D.K. Shifflet & Associates, Ltd., 2004

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Riverside County	\$88.10	\$93.70	\$86.80	\$90.90	\$74.50
San Bernardino County	\$63.20	\$79.20	\$58.60	\$54.00	\$65.20

Source: D.K. Shifflet & Associates, Ltd., 2004

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to San Bernardino County	CA Leisure Travel to Riverside County
Avg. length of stay (all trips)	1.1 nights	1.5 nights
Avg. length of overnight stay	2.5 nights	3.0 nights
Avg. party size	3.1 persons	3.0 persons
% Traveling with children	27%	21%
% Day trips	55%	50%
Mean household income	\$57,800	\$69,300
Used rental car	8%	10%
Top states of origin	Arizona/Washington, 3% each Oregon, 2%	Arizona/Washington, 3% each Oregon, 2%

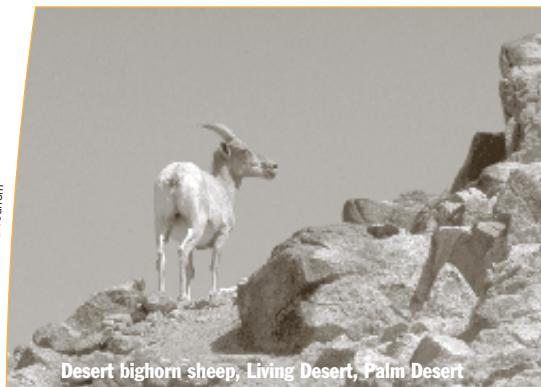
Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Riverside/San Bernardino	65.6%	3.0%	\$84.36	3.7%	477	37,824

Source: Smith Travel Research, 2005

Robert Holmes/California Tourism



Desert bighorn sheep, Living Desert, Palm Desert

Population of Cities (2004)

- **Barstow** 23,200
- **Palm Springs** 44,250
- **Palm Desert** 44,800

National Parks

- **Joshua Tree National Park**
2004 attendance 1,243,659
- **Death Valley National Park**
2004 attendance 738,522

State Parks

- **Red Rock Canyon State Park**
Attendance 102,826*
- **Providence Mountains State Park**
Attendance 9,876*
- **Salton Sea State Recreation Area**
Attendance 227,533*
- **Anza-Borrego Desert State Park**
Attendance 538,798*

*2003/2004 fiscal year



Inland Empire

Visitors to the Inland Empire find a world of surprises: nearby ski resorts, lush vineyards, a mission-style inn, orchards, and hot-air balloon festivals. The region encompasses the western portions of Riverside and San Bernardino Counties, including the communities of Riverside, San Bernardino, Temecula, Hemet, Big Bear, Lake Arrowhead, San Jacinto and Victorville.



Big Bear Lake, mountain biking

Robert Holmes/California Tourism

Population of Cities (2004)

- **Riverside** 277,000
- **San Bernardino** .. 196,300
- **Ontario** 167,900
- **Moreno Valley** . . . 155,100

State Parks

- **Lake Perris State Recreation Area**
Attendance 1,243,738*
- **Silverwood Lake State Recreation Area**
Attendance 308,637*
- **Mount San Jacinto State Park**
Attendance 165,891*

*2003/2004 fiscal year

Domestic Visitor Volume

	Avg. Annual County Volume 2001-2003 (person-trips)	Business Travel	Leisure Travel
Riverside	15.51 million	2.74 million	12.77 million
San Bernardino	11.85 million	2.62 million	9.23 million

Source: D.K. Shifflet & Associates, Ltd., 2004

Average expenditures per person per day (less transportation) 2004

	Total	Business Travel	Leisure Travel	Leisure CA Resident	Leisure Non- Resident
Riverside County	\$88.10	\$93.70	\$86.80	\$90.90	\$74.50
San Bernardino County	\$63.20	\$79.20	\$58.60	\$54.00	\$65.20

Source: D.K. Shifflet & Associates, Ltd., 2004

Domestic Visitor Profile, Avg. 1999-2001

	CA Leisure Travel to San Bernardino County	CA Leisure Travel to Riverside County
Avg. length of stay (all trips)	1.1 nights	1.5 nights
Avg. length of overnight stay	2.5 nights	3.0 nights
Avg. party size	3.1 persons	3.0 persons
% Traveling with children	27%	21%
% Day trips	55%	50%
Mean household income	\$57,800	\$69,300
Used rental car	8%	10%
Top states of origin	Arizona/Washington, 3% each Oregon, 2%	Arizona/Washington, 3% each Oregon, 2%

Source: D.K. Shifflet & Associates, Ltd., 2002

Lodging Statistics

Location	Avg. Occupancy Rate 2004	Percent change 2003:2004	Average Room Rate 2004	Percent change 2003:2004	Hotel Census	Room Census
Riverside/ San Bernardino	65.6%	3.0%	\$84.36	3.7%	477	37,824

Source: Smith Travel Research, 2005

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International Arrivals at California Ports of Entry, prepared for California Tourism by CIC Research, Inc. 2005

California Domestic Travel Report, 2004, California, prepared for California Tourism by D.K. Shifflet & Associates, July 2005

Monterey Bay Aquarium, February 2005

National Park Service, February 2005

Smith Travel Research, 2004 year end

Sources of Travel and Tourism Statistics*

Type of Data	Source
CALIFORNIA STATISTICS	
Domestic travel to California; Overseas travel to California; Travel impacts by county; International arrivals at California ports of entry	California Tourism www.visitcalifornia.com (916) 327-3391 FAX (916) 322-3402
Air Passenger Volume	
San Francisco	San Francisco International Airport www.sfoairport.com/about/stat/as_min_atl.asp ; (650) 876-2422
Oakland	Metropolitan Oakland International Airport; (510) 577-4152
Los Angeles	Los Angeles World Airports; www.lawa.org
San Diego	San Diego Airport Operations; www.san.org/airport/facts_and_fun/traffic_reports.asp
Outdoor Recreation	
National park visitation	National Park Service - Statistics; www2.nature.nps.gov/mpur/index.cfm
State park visitation	California Department of Parks and Recreation; www.parks.ca.gov
Various studies on recreational visits to US Forests	USDA Forest Service; www.fs.fed.us
Private theme parks and attractions	International Association of Amusement Parks and Attractions; www.iaapa.com
Hotel Occupancy	
Northern or Southern California	"Trends" PKF Consulting - San Francisco or Los Angeles. Order monthly, quarterly or annual reports on-line. www.pkfonline.com
California – by metropolitan areas	Smith Travel Research – order publications on-line; www.str-online.com ; (615) 824-8664
Transient occupancy tax receipts (by city collecting)	Dean Runyan Associates www.deanrunyan.com – click on Travel Data, then California (503) 226-2973
US STATISTICS	
Trip and traveler characteristics of US resident travel to and through the US.	Directions/Destination/Index; D.K. Shifflet & Associates Ltd. www.dksa.com ; (703) 536-0500; FAX (703) 539-0580
US travel trends; US travel expenditures, job impacts; State travel budgets, etc.	Travel Industry Association of America www.tia.org ; (202) 408-8422; FAX (202) 408-1255
Air passenger origins	Air Transport Association; www.airlines.org
INTERNATIONAL TRAVEL STATISTICS	
Various studies on travel to and from Pacific area destinations (Japan, Thailand, India, etc.)	Pacific Asian Travel Association; www.pata.org
Canadian travel	Statistics Canada; www.statcan.com
Inbound travel to the U.S.	International Trade Administration, Office of Travel & Tourism Industries; www.tinet.ita.doc.gov
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World travel trends	World Travel and Tourism Council; www.wttc.org
OTHER TRAVEL & TOURISM RELATED INFORMATION	
Text of conference presentations on travel/tourism marketing, case studies, destination promotion, etc. Quarterly articles on studies of visitor attitudes, trip behavior, travel research methodology. Journal of Travel Research.	Travel and Tourism Research Association; www.ttra.com

*Inclusion in these listings does not constitute endorsement. Some of these sources charge fees for providing reports and data.



California Tourism
980 9th Street, Suite 480
Sacramento, CA 95814-2749
Tel: (916) 444-4429
Fax: (916) 444-0410
E-mail: info@cttc1.com
Web site: www.visitcalifornia.com